



Boundless Opportunity

— 2017 GOVERNOR'S CONFERENCE ON TOURISM —

China



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Opportunity*
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CHINA MARKET BRIEFING



OVERVIEW

- **2016 China Market Recap**
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2016 CHINA MARKET RECAP



Summary of Recap

AFFLUENT SEGMENT BOOMING

- Growth: 17% annual spending increase v. 5% middle class
- Spend categories: food, education and travel
- Location: 46% will live in Tier 2 and Tier 3 cities by 2020

YOUNG DEMOGRAPHIC KEY

- Age: under 35 is dominant force in China's consumer market
- Absolute growth: under-35 demographic will drive a 55% growth in consumer spending over the next 5 years
- Share: by 2022 will represent 53% of total Chinese consumption

FIT SOARING

- Soaring segment: 40% of visitors to the US in 2016 were FIT and growing
- Experienced: 5.5 international trips on average
- Confident: 41% speak English, 77% have Bachelor degree or above

RISING DISPOSABLE INCOMES:

- Disposable incomes grew 7.8% in 2016
- Upper middle & high-income class set to make up 30% of the population by 2030, triple today's level

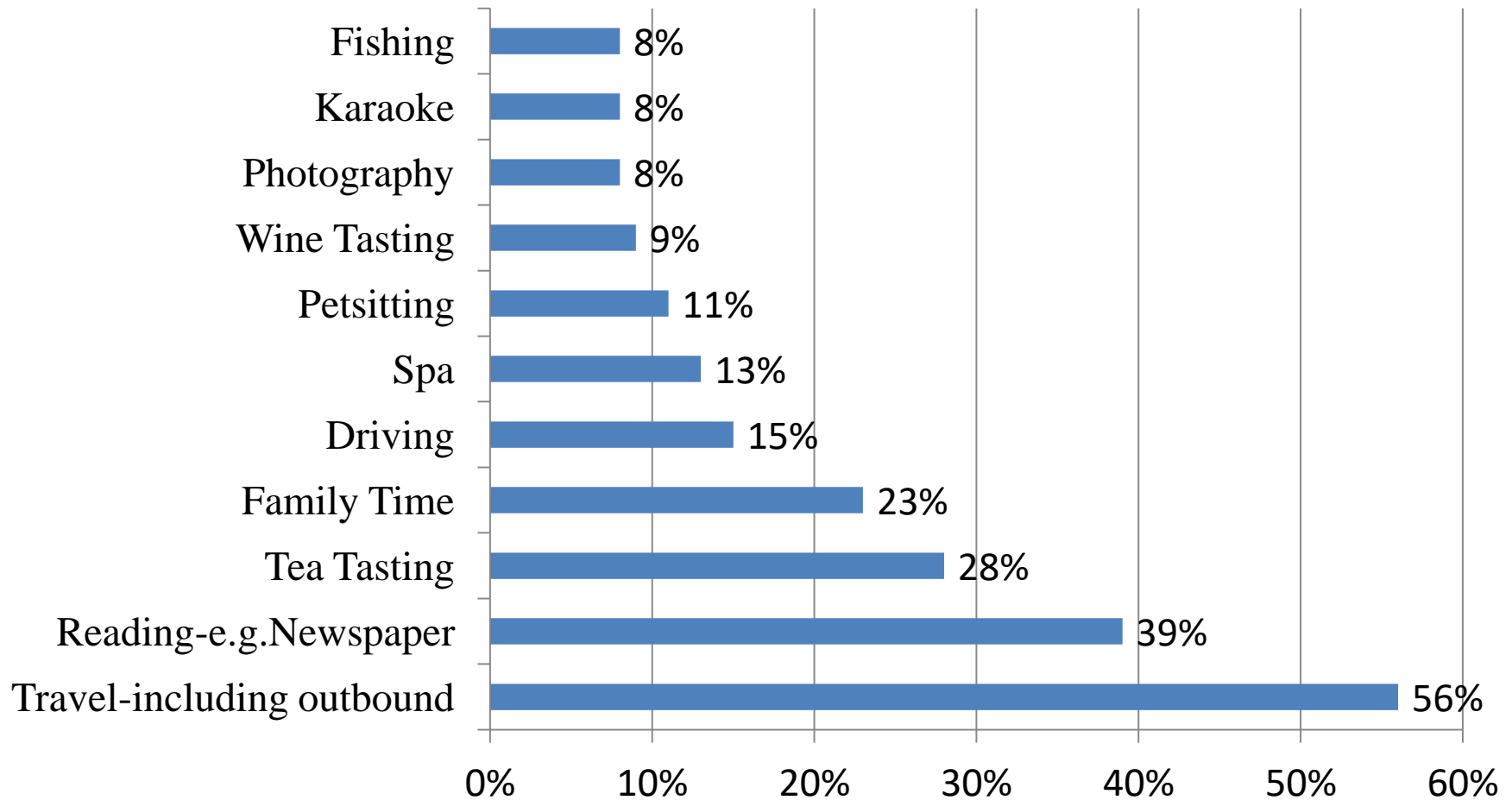
SOARING MIDDLE CLASS:

- 2015: 300 million (1/4 of China's population)
- 2020: 600 million (1/2 of China's population)

CHINA MARKET UPDATE



Preferred Leisure Activities of China's Middle & Upper Classes



China Outbound Travel Market Growth

2013

97 million ---World's #1 source market

2014

115 million ---Double 2010 levels

2015

120 million ---9% of China's population

2016

133 million ---9.5% of China's population

2017

146 million ---10.5% of China's population

2020

250 million ---14% annual growth

Chinese Overseas Travel Expenditures

2014

\$164 BILLION,
27% increase,
higher than the
2013 increase of
24%

China contributes
nearly 20% of the
world's travel
increase during
that year

2015

Continued to
soar an
additional **23%**

48% of Chinese
outbound tourists
indicate they
plan to increase
travel spend

60% will spend
over **\$1,500** for
each trip

2016

China overtakes the
U.S. as the **#1**
BUSINESS travel
market in the world,
generating 20% of
global business
travel spend

Overseas tourism
spend reaches **\$242**
billion, up **20%** over
2015 level

A few numbers at a glance

- Average \$7,500** spend per person per trip to U.S.
- 19%** of the annual salaries on overseas travel is spend per trip by middle and upper classes
- 28%** Chinese travelers expect to spend \$5000-\$7,499 for next U.S. trip

Population: Rise of Tier 2 Cities

We all know----China is a massive target market with adult population which is at 1,051 millions

- 5 times larger than the U.S.
- 20 times the adult population of the U.K.



However, what we don't know----KEY TO THE RISE OF CHINA'S TIER 2 MARKETS IS THE MASSIVE POPULATION OF THESE SECONDARY MARKETS:

- 10 MILLION POPULATION: 13 cities in China
 - 5 MILLION POPULATION: 80 cities in China
 - 1 MILLION POPULATION: 140 cities in China
- compared with just 10 in the U.S.

New China-U.S. Flight Launches in 2017

Destinations	Routes	Airlines	Frequency	Remarks
Los Angeles	Xiamen-Los Angeles	Xiamen Airlines	3X Weekly	Launched in June
	Shenzhen-Los Angeles	Air China	3X Weekly	Planned in July
New York	Fuzhou-New York	Xiamen Airlines	3X Weekly	Launched in Feb

Current annual seat capacity stands at **4,791,385** regularly-scheduled seats, a capacity jump of **500,000** seats versus just **6 months ago**

-15 U.S. Non-Stop Gateways to China

Cities on West Coast: Los Angeles, San Francisco, Seattle, Las Vegas, San Jose

China Airlift to the U.S.

16 China Non-Stop Gateways to the U.S

Current

- Beijing
- Shanghai
- Guangzhou
- Chengdu
- Wuhan
- Nanjing
- Xian
- Hangzhou
- Changsha

New

- Shenyang
- Shenzhen
- Qingdao
- Fuzhou
- Chongqing
- Jinan
- Tianjin

China has 206 airports and is now building another 66 major new airports – a **32% increase in number of airports in China in just the coming 5 years**

SHIFT TO MOBILE

- Size: 1.3 billion mobile phones in China means 1 mobile for every Chinese on average
- FIT means mobile: most FITs use their mobile phone to book travel
- Mobile Internet: 685 million users use their mobile to access the Internet; 50%+ 4G

MOBILE IN TRAVEL PURCHASE

- Travel search & planning: over half of destination search & planning is done on mobile
- Bookings: 72% of online bookings on Top 5 OTAs are done directly via mobiles; 81% of online hotel bookings are made on mobiles
- Booking apps: OTAs lead the way, with traditional TO/TAs playing catch up

2017 New Trend-Mobile Payment

Two dominated mobile payment systems in mainland China

•Alipay:

- 54% China's third-party mobile payment volume market share
- +450 Million Active Members
- 26 foreign countries and regions
- 18 foreign currencies.

•WeChat Pay:

- 889 Million Active Users
- 70% Chinese use WeChat
- 15 foreign countries and regions
- 12 foreign currencies

•Now, they are mainly setup at Restaurants, Airport Merchants, Luxury Retailers, Hotels, tourism attractions.



CITCON Payment Solution

www.citcon-inc.com

Source: CITCON; Tencent



支付宝
ALIPAY



安亿投

2017 New Trend-Online Booking Habits

GROWTH IS FOUND ONLINE:

- 20% growth in online purchases of travel in 2016
- \$732 billion in tourism products bought online in 2016
- Online tools are key in both the destination selection and actual booking
- Online platforms are the China outbound travel purchasing channels of the future

OTAs GAINING MARKET SHARE:

- 2017 Chinese New Year OTA bookings up 60% v. overall outbound market up 10%
- 3 OTAs dominate: C-Trip, Qunar and Tuniu--over 80%of China's OTA sector
- Air tickets (#2 after OTA booking) and accommodations (#3) are increasingly being booked on service providers' websites directly
- Fly & Drive and car rental are soaring in popularity

VISA REJECTIONS:

- Individual cases of Visa rejections happened on part of the applicants when applying the U.S. Visa for MICE groups, which have created some concerns among both Chinese travel partners and some US destinations
- No dramatic drop on the passing rate of Visa application for leisure guests.

US TRAVEL BAN:

- Little media coverage in China
- Little interest among media and general public
- Perceived image increased safety in the US



PARTNERSHIP WITH BRAND USA



Leveraging China's 1st and 2nd Tier Markets

•U.S. PRESENCE

The U.S. is expanding its consular presence in Wuhan, Chengdu and Shenyang since these 3 markets are the fastest-growing of China

•BRAND USA MISSION:

Brand USA has extended its annual China Mission to include Wuhan & Shenyang for the first time, to leverage this phenomenal growth in China's 2nd tier markets

•BRAND USA ROAD SHOW:

Organized by four offices (Beijing, Shanghai, Guangzhou, Chengdu) by monthly to educate Travel Trade National wide and secure development of new U.S. Tour product beyond the traditional U.S. gateways.

More exposure on the market

•**BRAND USA FAM GROUP**

- target both leisure & MICE markets: Aim to introduce more resources to the travel trade partners and build up confident on promoting the destinations by showing the willingness of cooperation.
- rapidly boost earned media coverage/visibility nationwide

•**BRAND USA related events or Campaign:**

- generate China Co-op Investment opportunities for partner



Brand USA-”National Parks Adventure” Film Premiere on June in Beijing

DESTINATION APPEALS



Match Arizona's profile?

- **BEYOND THE GATEWAYS:** rapid growth in travel beyond the gateways & the icons to rural areas, National Parks, and lesser-known States
- **DURATION:** 10-14 day trips to the U.S. are increasingly popular
- **IN-DEPTH EXPERIENTIAL TRAVEL:** slow-moving, experiential travel is the new trend
- **HOT 2017 U.S. TRAVEL THEMES FOR CHINESE:**
 - National Parks
 - Fly & Drive
 - Wine Tasting
 - Extended/Joint Family travel
 - Soft Adventure
 - Educational Travel

Arizona's advantages

- Iconic views
- Clean & Fresh Air
- Western Style and Cowboy culture along Route 66
- Warm Seasonal Weather
- Less Crowdedness
- More safety
- Shopping
- In-depth travel experience



TRAVEL TRENDS



Rapid shift in Style of U.S. Travel

- Rapid increase in **repeat travelers to the U.S.**, mostly due to **10-year visa**
- Rapid rise in **FIT travelers to the U.S.**; **FIT market far outpacing overall outbound market**
- Rapid increase in **Skeleton Package travelers to the U.S.**, many of which are **booked online via OTA or direct on service providers' websites**
- Growth of themed tours and in-depth tours focusing on one or two states with focus on more authentic, richer experiences
 - e.g. National Parks series product-combining NPs in both Utah and Arizona
- Fly & Drive market is booming among FITs**
- Secondary markets of China growing faster than traditional Tier 1 cities**
 - Tier 1 Cities:** Beijing, Shanghai, Guangzhou, Shenzhen, Tianjin
 - Tier 2 Cities:** Chongqing, Chengdu, Wuhan, Haerbin, Shenyang, Hangzhou, Changsha Xiamen,etc

Hotel Bookings

- HOTEL WEBSITES:
 - Direct hotel bookings via hotel own digital platforms are rapidly growing
- HOTEL BOOKING ENGINES:
 - Booking engines such as Ctrip.com(booking.com) or Agoda are increasingly important hotel booking channels for Chinese FITs

MEDIA TRENDS



- **Social Media Channels in China**

- Most social media channels we are familiar with are blocked in China
e.g. Instagram, Facebook, Twitter, YouTube and Google
- In China, the people mainly use its own homegrown social media channels
e.g. Weibo(Twitter), WeChat (smart phone apps like Facebook), Youku(YouTube)



- **WeChat**

- Quickly becoming one of the China's most popular social media channels, an instant messaging and multimedia service that combines the attributes of WhatsApp + Twitter + Facebook + Instagram.
- It has 806 million monthly active users worldwide and is the most direct way for brands to connect to mobile consumers in China.
- WeChat is a great channel for sharing inspirational image-driven content and useful travel tips. It is also a key tool for targeting the millennial audience



- **Weibo**

- The primary platform to post news and is a great channel for users to connect with celebrities and brands; it has the highest engagement among trend-setters, with 150 million monthly active users across a wide demographic in China.
- Total advertising expenditure on China social network is expected to reach RMB 44.9 billion in 2017.

CHINA READY



Daily communication

- **Popular daily communication tool: WeChat**

- send message
- voice call
- video call
- share photos and news in MOMENTS!



- **Prepare a destination brochure, video, audio guide in Chinese Language**

- Shopping center
- Attractions
- Tour activities

- **Hire Chinese-speaking staff or Chinese Staff**

- Hotel & Resorts
- Visitor Centers
- Tour Company

Culture Differences

- Building Guanxi (personal relationships) is important
- Gift giving indicates that you are interested in building a relationship
 - Do NOT give:
 - Clocks or Bells, Yellow Chrysanthemums (means tragedy happens in someone's family)
 - Green hats to man (means wife cheated on her husband)
 - Umbrellas (means lovers will be apart or family will be broken)
 - Do NOT wrap gifts with black or white paper (means bad luck)
 - Red and Gold are always a good choice of color! (means lucky and rich)
- Avoid awkward topics such as Taiwan, Hong Kong or Tibet
- “Saving Face”, not “Losing Face”
- Lucky Numbers: 8, 9, 6
- Unlucky numbers: 4, 7, 14 (please don't put your hotel guests on these floors)
- Make an effort to learn and use at least a few words in Chinese; your initiative will be noticed and appreciated.
 - Ni Hao (你好！) - Xiexie (谢谢！) - Bukeqi (不客气！)

•New Product Developments

1) Wholesaler/Tour Operator: Utour

- New leisure travel package to include Phoenix, Tucson, Sedona designed with Utour
- Some biggest selling points: Saguaro National Park, Sedona red rock, Route 66 & Grand Canyon National Park-South Rim
- Total 392 slots sold out from April to June, total 21 groups, from 10 pax (VIP group) up to 30 pax per group from Shanghai and Beijing.



u-tour 众信旅游

售价 ¥23200起

出发日期 4月16日, 27日, 5月16日, 4日, 11日, 18日, 25日, 6月1日, 8日, 15日, 22日, 29日

菲鳳騰達 14日游

美国东西海岸-夏威夷-大瀑布-凤凰城-66号公路-大峡谷国家公园-纯正式美式体验

特色景点

- 【见证沙漠奇迹】仙人掌国家公园, 野几米高的仙人掌漫山遍野, 绝佳摄影之地!
- 【探秘亚利桑那】著名的红色岩石和当地土著风情, 最正宗的美国南部风光!
- 【美国母亲之路】66号公路, 与古典、怀旧的美国相映成趣。
- 【应许之地】纽约的基和特里克教堂——繁华都市的古典地标; 图森圣泽维尔教堂——北美的西斯廷; 塞多纳圣十字教堂——艺术与环境的西部最完美的结合
- 【两大世界奇迹】真正的大峡谷国家公园(南峡), 尼亚加拉大瀑布
- 【三大特色美食】特色海鲜自助、墨西哥卷饼、蓝松麦当劳
- 【四大美式体验】美国本土连锁超市、奥特莱斯、自由女神游船、圣地亚哥老城
- 【五大历史遗迹】林肯纪念馆、越战纪念碑、费城独立宫、珍珠港、大风口古战场
- 【六大深度坐标】凤凰城、图森、塞多纳、旗杆镇、金曼、塞利格曼
- 【七大必去名城】纽约、华盛顿、费城、布法罗、拉斯维加斯、洛杉矶、圣地亚哥

【十全十“美”】一次玩遍美国东、西海岸, 深入南部腹地, 绝美夏威夷。

地区	姓名	电话	地址
上海地区	周海峰 2000177	20033322	人民广场
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	周海峰 2000177	84729143	南京东路
	周海峰 2000177	84729144	南京东路
	周海峰 2000177	84729145	南京东路
	周海峰 2000177	84729146	南京东路
	周海峰 2000177	84729147	南京东路
	周海峰 2000177	84729148	南京东路
	周海峰 2000177	84729149	南京东路
	周海峰 2000177	84729150	南京东路
	周海峰 2000177	84729151	南京东路
	周海峰 2000177	84729152	南京东路
	周海峰 2000177	84729153	南京东路
	周海峰 2000177	84729154	南京东路
	周海峰 2000177	84729155	南京东路
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	周海峰 2000177	84729157	南京东路
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	周海峰 2000177	84729160	南京东路
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	周海峰 2000177	84729162	南京东路
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	周海峰 2000177	84729164	南京东路
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	周海峰 2000177	84729167	南京东路
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	周海峰 2000177	84729169	南京东路
	周海峰 2000177	84729170	南京东路
	周海峰 2000177	84729171	南京东路
	周海峰 2000177	84729172	南京东路
	周海峰 2000177	84729173	南京东路
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	周海峰 2000177	84729176	南京东路
	周海峰 2000177	84729177	南京东路
	周海峰 2000177	84729178	南京东路
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	周海峰 2000177	84729181	南京东路
	周海峰 2000177	84729182	南京东路
	周海峰 2000177	84729183	南京东路
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	周海峰 2000177	84729189	南京东路
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	周海峰 2000177	84729193	南京东路
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	周海峰 2000177	84729196	南京东路
	周海峰 2000177	84729197	南京东路
	周海峰 2000177	84729198	南京东路
	周海峰 2000177	84729199	南京东路
	周海峰 2000177	84729200	南京东路

2) LeTV Sports

- Outdoor expert Mr. David Cai and his team designed a new outdoor themed product after FAM trip to Arizona.
- In-depth hiking tour to Havasupai Fall for 3 nights and total trip for 9 days in Arizona.
- Total 18 people made the trip in May 20-28,2017
- New group in Sep is under discussion with AOA tour

5月20日，
乐视体育带你走进美国科罗拉多大峡谷
探秘原始印第安部落
这段刺激炫酷的行程即将开启！
带上你的朋友、家人
一起来体验这段奇妙之旅吧！



微信扫一扫
关注公众账号

活动亮点

1. 探秘印第安原始部落



2. 游览著名的美国66号公路

第一天

5月20日 周六（北京—凤凰城）

航班

HU495 20MAY 北京—西雅图 15:40（北京时间）—

11:35（当地时间）

AS926 20MAY 西雅图—凤凰城 13:35—16:25（当地时间）



微信扫一扫
关注公众账号

凤凰城—梅萨市（the City of Mesa），入住希尔顿酒店修整，自由活动

梅萨是凤凰城都会区的第三大城市，位于都会区东部的“东部峡谷”（也称太阳谷）地区，距凤凰城市中心和机场15分钟车程直达。

梅萨是全美人口增长最快的城市之一，人口数超过了迈阿密和匹兹堡。



梅萨市湖边的户外活动



梅萨市湖边的户外活动

交通：飞机、巴士

用餐：飞机餐、晚餐自理

住宿：梅萨市希尔顿酒店

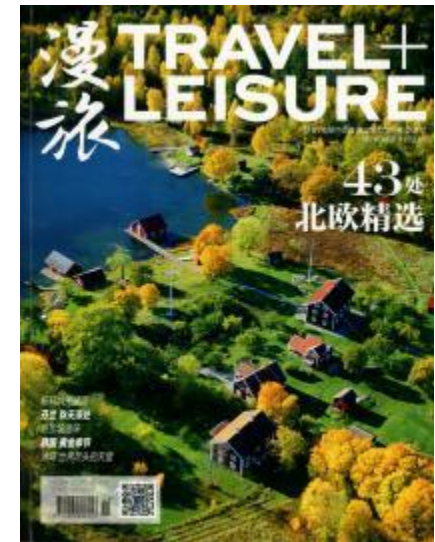
FY17-AOT China-Cont'd

- AOT official Sina weibo: **109%** increase of followers in FY 17; Total **24,280** followers as of June 2017; Year-to-date impressions are **0.8** million



FY17-AOT China-Cont'd

- Off-line Media Publicity: AD Value US\$ **2.85** million



- On-line Media Publicity: AD Value US\$ **1.50** million



- Total Number of Impressions: **63.4** million

FY17-AOT China-Cont'd

- Digital Influencers Engagement: 2 award winning KOLs participants of media fam in FY 17; Total engagement are **20** million ; AD Value is US\$ **238,000**





THANK YOU!

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Boundless Opportunity

— 2017 GOVERNOR'S CONFERENCE ON TOURISM —